



**LSERS**

LOUISIANA SCHOOL EMPLOYEES' RETIREMENT SYSTEM

# Your Form 1099-R in the mail

Tax time is around the corner. Your tax Form 1099-R was mailed Tuesday, January 16th and is now available for viewing online at [www.lasers.net](http://www.lasers.net). If you have not received your 1099-R in the mail by Thursday, February 1st, you can request a duplicate copy.

CORRECTED (if Checked)		OMB No. 1545-0119		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	
PAYER'S name, street address, city or town, state or province, country and ZIP or foreign postal code		1 Gross distribution	2017		Form 1099-R
		2a Taxable Amount			
		2b Taxable Amount not determined	Total distribution		
PAYER'S federal identification number	RECIPIENT'S identification number	3 Capital gain (included in box 2a)	4 Federal income tax		Copy C For Recipient's Records
RECIPIENT'S name		5 Employee contributions /Designated Roth Contributions or Insurance premiums	6 Net unrealized appreciation in employer's securities		
		7 Distribution code(s)	IRA/SEP/SIMPLE	8 Other	This information is being furnished to the Internal Revenue Service.
		9a Your percentage of total distribution	%	9b Total employee contributions	
		10 Amount allocable to IRR within 5 years	11 1 <sup>st</sup> year of desig. Roth contrib.	FATCA filing requirement	
		12 State tax withheld	13 State/Payer's state no.		14 State distribution
Account number (see instructions)		15 Local tax withheld	16 Name of locality		17 Local distribution

Form 1099-R (keep for your records) [www.irs.gov/form1099r](http://www.irs.gov/form1099r) Department of the Treasury - Internal Revenue Service

## About Box 5 on your 1099-R

This is what you need to know as your preparing your tax return:

### Amount in Box 5:

This number represents the tax-free amount of your retirement benefit received this year. This is the difference between the Gross distribution listed in Box 1 and the Taxable amount listed in Box 2A. It is not the amount of your insurance premium.

### No Amount in Box 5:

Your total Gross distribution amount is taxable, as you no longer have any tax-free contributions. If you are receiving a disability benefit, you will not have a tax-free amount because you are not eligible to recover the tax-free portion because you are not eligible to recover the tax-free portion until you would normally be eligible to retire.

5 Employee contributions /Designated Roth Contributions or Insurance premiums
\$

## Access online

It is easy to locate your 1099-R online

- Under Member Access, select View Personal Information
- Select 1099-R
- Choose Download Letter next to year 2017 to view and print your form

## Contact us

Phone: 225.925.6484 or 1.800.256.3718 | Email: [webmaster@lasers.net](mailto:webmaster@lasers.net) | Web: [www.lasers.net](http://www.lasers.net)